



**DONALD E. WILLIAMSON, ASSESSOR**

**County of San Bernardino**

**PRELIMINARY CHANGE OF OWNERSHIP REPORT**

(To be completed by transferee [buyer] prior to transfer of subject property  
in accordance with Section 480.3 of the Revenue and Taxation Code.)

**THIS REPORT IS NOT A PUBLIC DOCUMENT**

FOR RECORDER'S USE ONLY

Seller/Transferor:

Buyer/Transferee:

Assessor's Parcel Number(s):

Property Address or Location:

Mail Tax Information To: Name

Address

Phone Number (8 a.m.-5 p.m.) \_\_\_\_\_

FOR ASSESSOR'S USE ONLY

Con \_\_\_\_\_

Adj \_\_\_\_\_

NOTICE: A lien for property taxes applies to your property on January 1 of each year for the taxes owing in the following fiscal year, July 1 through June 30. One-half of these taxes is due November 1, and one-half is due February 1. The first installment becomes delinquent on December 10, and the second installment becomes delinquent on April 10. One tax bill is mailed before November 1 to the owner of record. IF THIS TRANSFER OCCURS AFTER JANUARY 1 AND ON OR BEFORE DECEMBER 31, YOU MAY BE RESPONSIBLE FOR THE SECOND INSTALLMENT OF TAXES DUE FEBRUARY 1.

A Preliminary Change in Ownership Report must be filed with each conveyance in the County Recorder's office for the county where the property is located; this particular form may be used in all 58 counties of California.

The property which you acquired may be subject to a supplemental assessment in an amount to be determined by the San Bernardino County Assessor. For further information on your supplemental roll obligation, please call the San Bernardino County Assessor at (909) 387-8307.

**PART I: TRANSFER INFORMATION**

*Please answer all questions.*

YES NO

- ☐ ☐ A. Is this transfer solely between husband and wife? (Addition of a spouse, death of a spouse, divorce settlement, etc.)
- ☐ ☐ B. Is this transaction only a correction of the name(s) of the person(s) holding title to the property? (For example, a name change upon marriage)?
- ☐ ☐ C. Is this document recorded to create, terminate, or reconvey a lender's interest in the property?
- ☐ ☐ D. Is this transaction recorded only as a requirement for financing purposes or to create, terminate or reconvey a security interest (e.g., cosigner)?
- ☐ ☐ E. Is this document recorded to substitute a trustee under a deed of trust, mortgage, or other similar document?
- ☐ ☐ F. Did this transfer result in the creation of a joint tenancy in which the seller (transferor) remains as one of the joint tenants?
- ☐ ☐ G. Does this transfer return property to the person who created the joint tenancy (original transferor)?
- ☐ ☐ H. Is this transfer of property:
- ☐ ☐ 1. to a trust for the benefit of the ☐ Grantor ☐ Grantor's spouse?
- (a) I am/We are still eligible for the Homeowner's Exemption and wish to keep this exemption. ☐ Yes ☐ No
- ☐ ☐ 2. to a trust revocable by the transferor?
- ☐ ☐ 3. to a trust from which the property reverts to the grantor within 12 years?
- ☐ ☐ I. If this property is subject to a lease, is the remaining lease term 35 years or more including written options?
- ☐ ☐ \*J. Is this a transfer between parent(s) and child(ren)? ☐ or from grandparent(s) to grandchild(ren)? ☐
- ☐ ☐ K. Is this transaction to replace a principal residence by a person 55 years of age or older?
- Within the same county? ☐ Yes ☐ No
- ☐ ☐ \*L. Is this transaction to replace a principal residence by a person who is severely disabled as defined by Revenue and Taxation Code section 69.5?
- Within the same county? ☐ Yes ☐ No

\*If you checked "Yes" to "J," "K" or "L," you may qualify for a property tax reassessment exclusion, which may result in lower taxes on your property. Failure to file a claim results in the reassessment of the property.

Please provide any other information that would help the Assessor to understand the nature of the transfer.

IF YOU HAVE ANSWERED 'YES' TO ANY OF THE ABOVE QUESTIONS **EXCEPT J, K OR L**, PLEASE SIGN AND DATE,  
OTHERWISE COMPLETE BALANCE OF THE FORM.

**PART II: OTHER TRANSFER INFORMATION**

A. Date of transfer, if other than recording date \_\_\_\_\_

B. Type of transfer. Please check appropriate box.

☐ Purchase ☐ Foreclosure ☐ Gift ☐ Trade or Exchange ☐ Merger, Stock or Partnership Acquisition

☐ Contract of Sale - Date of Contract \_\_\_\_\_

☐ Inheritance - Date of Death \_\_\_\_\_ ☐ Other (please explain) \_\_\_\_\_

☐ Creation of a Lease ☐ Assignment of a Lease ☐ Termination of a Lease ☐ Sale/Leaseback

Date lease began \_\_\_\_\_

Original term in years (including written options)

Remaining term in years (including written options)

C. Was only a partial interest in the property transferred? ☐ Yes ☐ No

If "Yes," indicate the percentage transferred \_\_\_\_\_ %.

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Please answer, to the best of your knowledge, all applicable questions, sign and date. If a question does not apply, indicate with "N/A."

**PART III: PURCHASE PRICE AND TERMS OF SALE**

- A. CASH DOWN PAYMENT OR Value of Trade or Exchange (excluding closing costs) Amount \$ \_\_\_\_\_
- B. FIRST DEED OF TRUST @ \_\_\_\_\_ % interest for \_\_\_\_\_ years. Pymts./Mo. = \$ \_\_\_\_\_ (Prin. & Int. only) Amount \$ \_\_\_\_\_
- ☐ FHA ( \_\_\_\_\_ Discount Points) ☐ Fixed Rate ☐ New Loan
- ☐ Conventional ☐ Variable Rate ☐ Assumed Existing Loan Balance
- ☐ VA( \_\_\_\_\_ Discount Points) ☐ All Inclusive D.T. (\$ \_\_\_\_\_ Wrapped) ☐ Bank or Savings & Loan
- ☐ Cal-Vet ☐ Loan Carried by Seller ☐ Finance Company
- Balloon Payment ☐ Yes ☐ No Due Date \_\_\_\_\_ Amount \$ \_\_\_\_\_
- C. SECOND DEED OF TRUST @ \_\_\_\_\_ % interest for \_\_\_\_\_ years. Pymts./Mo. = \$ \_\_\_\_\_ (Prin. & Int. only) Amount \$ \_\_\_\_\_
- ☐ Bank or Savings & Loan ☐ Fixed Rate ☐ New Loan
- ☐ Loan Carried by Seller ☐ Variable Rate ☐ Assumed Existing Loan Balance
- Balloon Payment ☐ Yes ☐ No Due Date \_\_\_\_\_ Amount \$ \_\_\_\_\_
- D. OTHER FINANCING: Is other financing involved not covered in (b) or (c) above? ☐ Yes ☐ No Amount \$ \_\_\_\_\_
- Type \_\_\_\_\_ @ \_\_\_\_\_ % interest for \_\_\_\_\_ years. Pymts./Mo. = \$ \_\_\_\_\_ (Prin. & Int. only)
- ☐ Bank or Savings & Loan ☐ Fixed Rate ☐ New Loan
- ☐ Loan Carried by Seller ☐ Variable Rate ☐ Assumed Existing Loan Balance
- Balloon Payment ☐ Yes ☐ No Due Date \_\_\_\_\_ Amount \$ \_\_\_\_\_
- E. WAS AN IMPROVEMENT BOND ASSUMED BY THE BUYER? ☐ Yes ☐ No Outstanding Balance: Amount \$ \_\_\_\_\_
- F. TOTAL PURCHASE PRICE (or acquisition price, if traded or exchanged, include real estate commission if paid.)
- Total Items A through E \$ \_\_\_\_\_
- G. PROPERTY PURCHASED ☐ Through a broker ☐ Direct from seller ☐ From a family member ☐ Other (explain) \_\_\_\_\_
- If purchased through a broker, provide broker's name and phone number:
- Please explain any special terms, seller concessions, or financing and any other information that would help the Assessor understand the purchase price and terms of sale.

**PART IV: PROPERTY INFORMATION**

- A. TYPE OF PROPERTY TRANSFERRED:
- ☐ Single-Family Residence ☐ Agricultural ☐ Timeshare
- ☐ Multiple-Family Residence (no. of units \_\_\_\_\_) ☐ Co-op/Own-your-own ☐ Manufactured Home
- ☐ Commercial/industrial ☐ Condominium ☐ Unimproved lot
- ☐ Other (Description: i.e., timber, mineral, water rights, etc. \_\_\_\_\_)
- B. IS THIS PROPERTY INTENDED AS YOUR PERSONAL RESIDENCE? ☐ Yes ☐ No
- If "Yes," enter date of occupancy \_\_\_\_\_ 20 \_\_\_\_\_ on-intended occupancy \_\_\_\_\_ / \_\_\_\_\_ / 20 \_\_\_\_\_.
- MONTH DAY YEAR MONTH DAY YEAR
- C. IS PERSONAL PROPERTY INCLUDED IN PURCHASE PRICE (i.e., furniture, farm equipment, machinery, etc.) (other than a manufactured home subject to local property tax)? ☐ Yes ☐ No
- If "Yes," enter the value of the personal property included in the purchase price \$ \_\_\_\_\_ (Attach itemized list of personal property.)
- D. IS A MANUFACTURED HOME INCLUDED IN PURCHASE PRICE? ☐ Yes ☐ No
- If "Yes," how much of the purchase price is allocated to the manufactured home? \$ \_\_\_\_\_
- Is the manufactured home subject to local property tax? ☐ Yes ☐ No What is the Decal Number? \_\_\_\_\_
- E. DOES THE PROPERTY PRODUCE INCOME? ☐ Yes ☐ No If "Yes," is the income from:
- ☐ Lease/Rent ☐ Contract ☐ Mineral Rights ☐ Other (explain) \_\_\_\_\_
- F. WHAT WAS THE CONDITION OF THE PROPERTY AT THE TIME OF SALE?
- ☐ Good ☐ Average ☐ Fair ☐ Poor
- Please explain the physical condition of the property and provide any other information (such as restrictions, etc.) that would assist the Assessor in determining the value of the property.

**CERTIFICATION****OWNERSHIP TYPE (✓)**

- Proprietorship ☐
- Partnership ☐
- Corporation ☐
- Other ☐

*I certify that the foregoing is true, correct and complete to the best of my knowledge and belief.**This declaration is binding on each and every co-owner and/or partner.*

Name of Assessee or Authorized agent (typed or printed)

Title

Signature of Assessee or Authorized agent

Date

Name of Entity (typed or printed)

Federal Employer ID Number

Preparer's Name and Address (typed or printed)

Title

Signature of Preparer

Telephone Number

Date

(Note: The Assessor may contact you for additional information.)

If a document evidencing a change of ownership is presented to the recorder for recordation without the concurrent filing of a preliminary change of ownership report, the recorder may charge an additional recording fee of twenty dollars (\$20)